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WPP woes persist

Former execs seek cash; analysts stay wary

By Laurel Wentz

LONDON—Two former high-level WPP Group executives, including former Ogilvy Group CEO Ken Roman, have filed separate claims against the company seeking compensation.

Ken Roman

As speculation continued last week about WPP's possible cash-flow difficulties, it was learned Mr. Roman has initiated administrative proceedings regarding his "golden parachute" benefits.

Both Mr. Roman and WPP confirmed arbitration proceedings have begun, but neither would offer any details of the proceedings.

"It's a private issue, and I'm not going to discuss it," Mr. Roman said.

Mr. Roman, who left Ogilvy two years ago, made his claim in the spring, say sources close to the company.

Under Ogilvy Group's golden parachute provisions, executives—including Mr. Roman—were entitled to three times their annual salaries and bonuses. The parachute plan covered 24 senior officers and was worth a total of $28 million. Mr. Roman's cash compensation was in excess of $500,000 annually.

Former WPP Treasurer Simeon Galpert is alleging unfair dismissal in his case, scheduled to be heard before a U.K. industrial tribunal in late October.

Sources close to the company say Mr. Galpert is seeking an undetermined amount of severance pay.

Mr. Galpert has handled WPP negotiations with its banks over new financing arrangements to keep WPP from breaching financial covenants and possibly running out of money. That plan was announced April 4, but he had left in March and filed the unfair dismissal claim in London in June.

WPP confirmed it's contesting the claim.

In an earlier dispute, Bruce Beach, who resigned as managing director of Ogilvy & Mather's Chicago office in January, filed suit against Ogilvy Group June 17 in U.S. District Court in Chicago.

His suit, which hasn't come to trial, alleges he wasn't paid $310,000 in performance bonuses due him from 1990.

Separately, in February, Mr. Beach filed a re-

(Continued on Page 46)

Time Warner, Mazda sign $96M deal

Cross-media package gets 'Meaning of life' theme

By Scott Donaton and Cleveland Horton

Mazda Motor of America is entering into a precedent setting $96 million deal with Time Warner for an extensive, three-year cross-media package that will help the automaker through a critical marketing period.

The program, set to start this year, is built around an umbrella theme, "The meaning of life." That theme stems from an editorial project of the same name that ran in *Life* in December 1988, in which a number of celebrities addressed the issue.

The Mazda deal, known to be in the works, is one of the largest integrated marketing packages sold by Time Warner. Besides the $40 million Chrysler Corp. deal signed in the fall of 1990, the company sold an $80 million program last year to General Motors Corp.

"This truly is the most integrated marketing program that we have engineered," said one Time Warner official who requested anonymity. "It is certainly multimedia."

The centerpiece of the program is Mazda's space commitment to Time Warner's magazines. The deal extends beyond Time Warner's New York-based titles—*Time, People, Sports Illustrated, Money, Fortune, Life* and *Entertainment Weekly*—to include some Time Publishing Ventures magazines, including *Sunset, Southern Living, Cooking Light, In Health, Parenting* and the fledgling *Martha Stewart Living*.

Other elements of the package include syndicated or cable TV programming, tied to the "Meaning of life" theme, to be sponsored by Mazda. In addition, *Life* is preparing to publish a book based on "The Meaning of Life," which Mazda will use as a marketing tool, perhaps to draw customers to showrooms.

"Efficiency is not the reason to do it. There's more of an emphasis on promotion and merchandising, rather than straight media."

The package may also involve Time Warner's selective-binding and ink-jet imaging capabilities used to personalize advertising and editorial messages.

It's not clear whether Mazda will adopt "The meaning of life" in all its advertising, handled by

(Continued on Page 46)

LAST MINUTE NEWS

Bain de Soleil goes to Ayer

CINCINNATI—Procter & Gamble Co. named N W Ayer to succeed Rosenfeld, Sirowitz, Humphrey & Strauss, both New York, on the Bain de Soleil suncare line, an estimated $3 million-plus account.

The Mediators files Chapter 11

NEW YORK—The Mediators filed for Chapter 11 bankruptcy protection Sept. 13 after Capital Cities/ABC, a creditor, sought to force the media buying company into involuntary Chapter 7 bankruptcy.

Northwest keeps O&M on roster

EAGAN, Minn.—Northwest Airlines will keep

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Data deal: Robert Maxwell is trying to sell Standard Rate & Data Service. **P. 2**

Cost of a :30: TV spots on 'Cheers' cost the most. **P. 6**

Ad Review: Bob Garfield 'Nupes' Jimmy Connors. **P. 50**

Tyson fight suffers black eye

By Ira Teinowitz and Joe Mandese

Mike Tyson's indictment last week on rape charges threatens to knock out some major marketing plans leading up to his Nov. 8 heavyweight bout with Evander Holyfield.

The pay-per-view telecast through Time Warner Sports' TVKO unit won't include commercials, but sponsors planning promotions and advertising around the fight are scrambling to review options.

An unidentified automaker has pulled out of negotiations for a major sponsorship since Mr. Tyson was indicted, Time Warner executives said, though negotiations with Coca-Cola Co., which has signed Mr. Holyfield as an endorser, and other potential sponsors are continuing.

Time Warner identified the other potential partners as a watch company, as official timekeeper; Eveready Battery Co.; and a fast-food chain.

"We are continuing to solicit companies for sponsorship. We are very open about the situation."

Eveready Manager of Corporate Information Patrick Farrell, however, said the company "was not involved in any way with this fight."

The fight's two biggest sponsors, Anheuser-Busch and Southland Corp., last week said they will proceed with ad-supported promotions planned long before the controversy about Mr. Tyson began.

But there were some indications that A-B might lower the level of its national TV advertising that will support the fight.

One option might be for A-B to supply the promised advertising touting the fight but exclude mention of its name or brands.

A-B, the main fight sponsor, is contracted to run $5 million to $6 million in network and cable TV spots promoting the fight's availability as a pay-per-view event on TVKO, in return for bumpers and the ring mat bearing the

(Continued on Page 46)

Mike Tyson's indictment means headaches for fight organizers.

NEWS SUMMARY

■ **Mazda and Time Warner** are entering into a $96 million deal for a three-year cross-media package that includes magazine ads, TV programming and a book deal. 1

■ **Ken Roman**, former ceo of Ogilvy Group, filed a compensation claim against Ogilvy's parent, WPP Group. 1

■ **Mike Tyson's** indictment on rape charges slowed marketing plans for his title bout Nov. 8, though Anheuser-Busch and Southland Corp. said they will honor their commitments. 1

■ **SFM Media Corp.** is among the independent media buying companies that are enjoying a hot new-business run. 3

■ **H.J. Heinz Co.** says it will increase its marketing budget by $100 million in the current fiscal year. 3

■ **Pillsbury Co.** will launch a food and cooking magazine, *Fast & Healthy*, next April. 4

■ **Hanna-Barbera Productions** has lined up a number of licensing agreements for "Yo, Yogi!" a new animated Saturday morning show on NBC-TV. 4

■ **TV prime-time** ad rates are trending lower this season, with top-ranked "Cheers" averaging about 9% below last year. 6

■ **Saturn Corp.** will shift emphasis from its employees to Saturn customers in its new ad campaign. 6

■ **William Kerr** left the New York Times Magazine Group to become president of Meredith Corp.'s magazine group. 12

■ **Environmental considerations** play a role in buying decisions, 63% of consumers said in a new survey. 14

■ **Movie theater chains** will use a variety of promotions to attract more patrons this fall. 27

■ **Place-based media,** including ad-supported TV in health clubs, continue to grow despite some complaints. 28

■ **Ad spending** in some industries outpaced the economy, a study of advertising-to-sales ratios shows. 32

■ **'Investment Vision'** will be relaunched as *Worth* in January, and the personal-finance magazine will begin to shift from controlled to paid circulation. 38

■ **'The Wall Street Journal'** will offer limited use of spot color to advertisers starting this fall. 38

■ **Cable TV's** upfront marketplace brought in an estimated $750 million, about the same as last year. 39

■ **Pet food sales** grew an estimated 4% in 1990, according to analyst John C. Maxwell Jr. 43

■ **Copley Press** will merge its *San Diego Union* and *Tribune*, further reducing the number of two-newspaper cities. 45

■ **Turner Broadcasting System** is pushing media ad packages that combine cable TV, home video and books. 48

■ **Jimmy Connors'** strong showing in the U.S. Open tennis tournament has led to revived endorsement activity. 50

■ **Network sports** is no longer the most efficient way to reach men on TV, according to an analysis by Bozell. 50

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SRDS on the block

Maxwell seeks to trim $2.3 billion in debt

By Scott Donaton

British publisher Robert Maxwell is trying to sell Standard Rate & Data Service, the leading U.S. publisher of media and marketing information directories and software.

The highly profitable SRDS is part of the information services group of Macmillan, the U.S. arm of London-based Maxwell Communication Corp.

Based on financial data obtained by *Advertising Age*, industry observers estimate SRDS could sell for as high as $150 million to $200 million. But several potential buyers say they viewed SRDS as a maturing business with little opportunity for growth and won't make an offer.

Robert Maxwell

Macmillan President Kevin Shaffer confirmed Mr. Maxwell plans to make asset sales to cut debt but wouldn't comment on the potential sale of the ad-supported SRDS directories. SRDS Publisher Craig Burr wouldn't comment either.

Mr. Maxwell, chairman of Maxwell Communication, said at last week's annual meeting he expects to reduce the company's $2.3 billion debt load by at least $750 million by next March through asset sales. He said the company is negotiating the sale of some businesses but didn't identify them.

SRDS, circulating primarily to ad agency media buyers and planners, publishes more than 30 directories and data bases that include ad rates and circulation reports for business and consumer magazines, newspapers, TV, radio and other media.

The listings are free, but the directories carry paid ads and most have a paid circulation base. SRDS also publishes several controlled circulation publications.

Like most media outlets, SRDS has felt the sting of the recession. Ad pages are down for its leading directories, while circulation has been hurt by layoffs and buget cutbacks at agency media departments.

SRDS had revenues of $37.3 million for the fiscal year ended March 31, down 4.7% from fiscal 1990, according to a "summary fact sheet" sent to potential buyers by Bankers Trust. Cash flow for the directories for fiscal 1991 was $19.7 million, down 10%.

The company also faces a number of long-term growth hurdles. SRDS is likely to eventually offer subscribers electronic versions of all of its directories, which may make them less attractive as an ad vehicle. And the spread of media rate negotiation could render SRDS a less useful reference tool.

"It's a premier property, an institution, [but] our attitude on SRDS is it's a very mature business without a lot of upside and we're not wildly interested in it," said the president of one trade publishing company who asked not to be named.

At least two potential buyers, Cahners Publishing Co. and K-III Holdings, are believed to have decided against making offers. Neither would comment.

Other potential buyers include McGraw-Hill and Canadian publisher Maclean Hunter, publisher of similar media information directories in Canada and Europe.

Mr. Maxwell picked up SRDS as part of his $2.6 billion acquisition of Macmillan in 1988.

One source said Mr. Maxwell is also considering the sale of the smaller Macmillan Directories Business, consisting of four wholly owned subsidiaries: National Register Publishing Co., publisher of 16 directories, including the Standard Directory of Advertisers; Salesman's Guide; Gulfstream Publishing Co.; and Marquis Who's Who. □

Laurel Wentz contributed to this story.

Nabisco nibbles on candy

By Judann Dagnoli

Cookie/cracker king Nabisco has its sights on candy with the test-market launch of a new line called Little Fudgies.

Little Fudgies, chocolate-covered versions of Mini Oreo and Mini Chips Ahoy! cookies, are packaged in 1.3-ounce bags rather than Nabisco Biscuit Co.'s traditional cartons.

A Nabisco spokesman denied the line is targeted at candy consumers, but an early version of a TV spot for Fudgies used the theme "To get a great candy, get a Little Fudgie."

Nabsico wouldn't discuss the TV spot, via FCB/Leber Katz Partners, New York, or give specific test markets.

Sources say one test market is Pittsfield, Mass., where Nabisco is placing Fudgies displays in supermarkets' candy aisles.

With the introduction, the company that already dominates the $7 billion cookie/cracker market with a 44% share is heading into a $9.7 billion field staked out by RJR Nabisco sister company Planters LifeSavers Co.

That unit only markets gum and hard-roll candies, however; Nabisco earlier sold off its Butterfinger, Baby Ruth and other entries in the $5.2 billion chocolate candy business.

Nabisco already markets a chocolate-covered version of its standard size Oreo cookie but so far hasn't marketed chocolate-coated Chips Ahoy! or any of its mini-cookie items.

Having nearly tapped out niches in cookies, Nabisco has lately demonstrated its determination to increase market share with moves into other crossover brands. Earlier this year, the company rolled national with Mr. Phipps pretzel chips, a combination chip/pretzel.

Mr. Phipps joined an aggressive new-product lineup at Nabisco in the past few years. They include Mini Chips Ahoy!, Sprinkled Chips Ahoy!, Fat-Free Premium Crackers, Ritz Bits Sandwiches With Cheese and Ritz Bits Sandwiches With Peanut Butter in 1990, followed by My Goodness! low-fat cookies, Teddy Graham Bearwiches and Mini Oreos this year. □

Baltics aware of Western brands

By Elena Bowes

GLOBAL NEWS

Consumers in the Baltics and nearby St. Petersburg are familiar with many popular Western food and personal-care brands, according to a recent Nielsen Marketing Research report.

Rowntree Mackintosh Confectionery's After Eight chocolate mints, Nestle's Nescafe coffee, Carlsberg Brewery's Carlsberg beer, Remy Martin cognac, Philip Morris Cos.' Marlboro cigarettes and Unilever's Rexona deodorant were mentioned frequently in the report. Nielsen wouldn't release detailed information on each product's popularity.

In the study, published by Nielsen in Frankfurt and the EKI Institute in Tallinn, Estonia, 2,000 consumers were asked what brands they know, use and consider to be well-made in product groups including confectionery, coffee, liquor, baby food, cigarettes, detergent and deodorant.

The 63-page study was based on a door-to-door survey and questionnaire conducted in May.

The German-language study also gives a demographic and economic overview of Latvia, Lithuania, Estonia and St. Petersburg, formerly Leningrad.

One Western marketer, Kellogg Co., is likely to make the list in the future as it plans to enter the Baltics soon.

Kellogg and Adazi, a private Latvian company, have entered into a joint venture called Kellogg Adazi Food Products and will build a plant to make Kellogg's Corn Flakes, Frosted Flakes and possibly other ready-to-eat cereals. The plant is expected to open in 1993.

The joint venture will also distribute the cereals throughout the Baltics, as well as in the republics of Russia and Byelorussia, said Dick Lovell, Kellogg communications manager. Ad plans will be developed "down the road," he said. □

Julie Skur Hill contributed to this story.

Buyers' boom costs ad agencies

Major wins by independent media buyers

Media buying assignments awarded in the last two years.

Advertiser	Media affected	Previous full-service agency	New media buyer	Billings (millions)
American Isuzu	All	Della Femina	SFM	$90
Nike	Broadcast	Wieden & Kennedy	SFM	$80
Reebok	Broadcast	Hill Holliday	DeWitt Media	$70
Bally Mfg.	Broadcast	J. Walter Thompson; BBDO	Western Int'l	$50
Coors Brewing	Broadcast	Foote Cone	Various	$50
American Cyanamid	Broadcast	BBDO; Backer Spielvogel	SFM	$40
DHL	Broadcast	Ketchum Advertising	Int'l Comm. Group	$30
Pennzoil	All	Elsamen, Johns & Laws	Int'l Comm. Group	$30
Vons Cos.	All	J. Walter Thompson	Western	$25
James River	All	Scali McCabe	SFM	$22
Benckiser	All	Bozell; Grey	SFM	$20
Bugle Boy	All	Rubin, Postaer	Int'l Comm. Group	$20
Reebok Apparel	All	Chiat/Day/Mojo	DeWitt Media	$20
Foot Locker	Broadcast	AC&R	SFM	$15
Quintessence	All	Della Femina	CPM	$10
Marriott restaurants	Broadcast, newspaper	Earle, Palmer, Brown	CPM	$10
JP Morgan	All	Backer Spielvogel	SFM	$9

Source: *Advertising Age*

By Joe Mandese

At a time when independent media buying companies are hot, a few are sizzling.

SFM Media Corp. this week is expected to land a $10 million media buying assignment for J.P. Morgan & Co., capping off a $130 million new-business run this year.

The New York shop has already added Alfred Dunhill Ltd., American Isuzu Motors, James River Corp. and Matrix Essentials in 1991.

Combined with about $150 million in new business last year, SFM has nearly doubled total billings to about $600 million in just two years.

"We've had a very good couple of years," said Chairman-President Walter Staab. "But there's no question about it, this has been a tremendous period of growth for all independents."

In the past two years, more than $1 billion in media buying assignments has moved to independent media companies from full-service ad agencies.

Mr. Staab said those moves have been prompted by a trend among clients to "unbundle" agency services and consolidate media buying to maximize clout.

The principals of the independents say the growth is coming from advertisers seeking an alternative to full-service agency relationships. They say the development has been as threatening to agency/client relationships as the recent deal between Coca-Cola Co. and Hollywood talent agency Creative Artists Associates (AA, Sept. 9).

In that deal, Coca-Cola is calling on the talent agency to help develop marketing strategies that have traditionally been the province of the soft-drink marketer's ad agencies.

But ad agencies are fighting back against buying shops and, in some cases, winning.

"Our biggest competition is not other independents, it is the [ad] agencies."

Some top full-service agencies have begun pitching their media credentials independently from the rest of their services. Young & Rubicam, New York, recently pitched and won media-only assignments from 20th Century Fox Film Corp. and Perrier Group.

Starting in October, major agencies including Backer Spielvogel Bates; Bozell; DDB Needham Worldwide; Lintas:USA; J. Walter Thompson USA; Saatchi & Saatchi

(Continued on Page 48)

The couple: Part III

By Cleveland Horton

The flirting neighbors meet again in a new network TV spot for Taster's Choice coffee, and this time he asks her for a date.

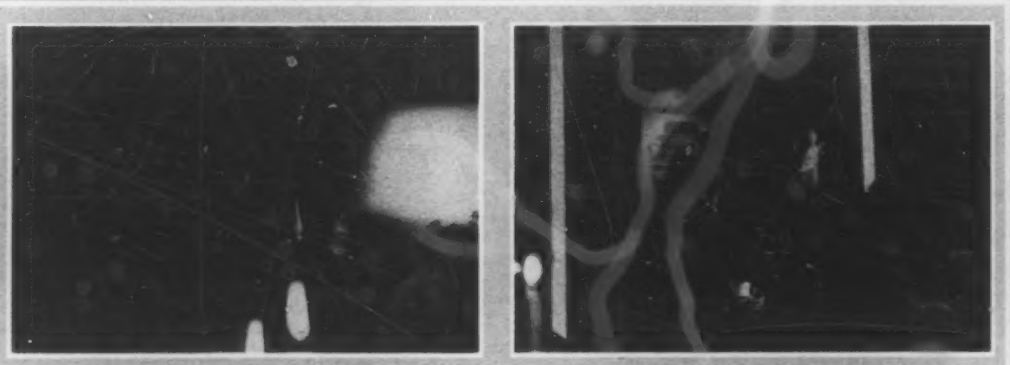
The series' third spot, which broke Sept. 15, opens at a dinner party where the female neighbor, played by Sharon Maughan, is a guest.

The dinner party is almost over when the doorbell rings. The hostess answers the door and greets the male neighbor, actor Anthony Head. He apologizes profusely to the hostess, who is his sister.

She ushers him in, noting he's just in time for coffee. The neighbors then share yet another magical moment before he asks her out.

The commercial is described as a "teaser" for the fourth episode, already shot and

(Continued on Page 45)



Boy meets girl again, this time at a dinner party, in the latest Taster's Choice spot.

Heinz marketing gets $100M boost

By Judann Dagnoli

H.J. Heinz Co. is pumping up a deflated marketing budget by $100 million for its current fiscal year in an effort to reverse volume declines and slipping earnings increases.

"This will be the year when Heinz is on the attack," said Chairman-CEO Anthony J.F. O'Reilly at Heinz's annual meeting last week. The company will "increase marketing support for our major brands, particularly in the tuna, food and weight-loss categories," he said.

Heinz's fiscal year began in May.

Mr. O'Reilly said proceeds from the sale of Hubinger Co., a corn milling operation, will be used to boost marketing spending to $550 million. Spending had fallen sharply in the first quarter of 1991, sources say.

The $100 million increase represents a 20% hike over the last fiscal year and is more than double the company's traditional 8% increase in marketing spending, said Ted Smythe, VP-corporate affairs.

The spokesman said the increase will go to advertising and consumer promotion rather than trade promotion, but Mr. O'Reilly's remarks at the annual meeting seemed to contradict that notion.

Wall Street sees problems at Heinz, led by CEO Anthony O'Reilly.

"Because two-thirds of all food buying decisions are made in the store, we stress deals, allowances and trade promotion that strengthen our presence at that critical point of sale," Mr.

(Continued on Page 45)

N W AYER:

The past catches up with its future

By Laurel Wentz and Jon Lafayette

As merger rumors swirled around N W Ayer, its chairman was unable to explain how the agency planned to remain independent while building a strong international network.

"I'm working on it, but there's nothing I can talk about yet," he said.

No, that response didn't come from a top Ayer executive last week but from Ayer Chairman Neal O'Connor in 1971.

Twenty years later, current Ayer Chairman Jerry Siano still faces essentially the same Catch-22: The agency has no major client that wants to employ the small Ayer international network around the world, and agencies don't want to tie into the Ayer network because it has no global business to offer.

Mr. Siano has said Ayer wants to strengthen its European network but isn't willing to relinquish control of the agency or go public. He's expected to clarify his strategy this week.

Ayer, one of the U.S.' oldest ad agencies, was actually one of the first to expand abroad, opening in the U.K. and Latin America to service Ford Motor Co. during the '30s. But Ayer lost the Ford account to J. Walter Thompson Co., and World War II diminished Ayer's interest in foreign affairs.

"Management didn't have the vision, and we didn't have an account to push it," one former senior Ayer executive recalled.

Ayer didn't start looking abroad again until the late '60s, long after rivals JWT and McCann-Erickson Worldwide were well-established globetrotters, and its efforts since then have been marked by fits and starts.

In 1967, Ayer bought a London agency, Alexander Butterfield, but sold most of its interest in the shop in 1971 to Pemberton Group, which agreed to represent Ayer in the U.K. Tom Maxey, now Ayer's vice chairman, was made VP-international operations and sent to London to work with Pemberton.

In 1974, Ayer entered a unique three-way joint venture with Charles Barker & Sons, London, and Werbeagentur Dr. Hegemann, Duesseldorf, and changed the name of the network to N W Ayer ABH.

The joint venture picked up a number of affiliates, then took off when Ayer landed the $30 million Pan American World Airways account in 1978. Before long, the Ayer network, including some 28 agencies, closed in on agencies such as

(Continued on Page 48)

Consciously green

Consumers question marketers' commitment

By Judann Dagnoli

An overwhelming majority of consumers say they base purchasing decisions on the environmental friendliness of products and companies, but few think big business is doing its part to save the Earth.

Those are some of the findings of the third annual Nationwide Environmental Survey conducted for Gerstman & Meyers, a packaging company.

The study found 83% of respondents said they prefer buying environmentally safe products, up from 82% last year. Sixty-one percent claimed they have passed up products within the past year due to environmental concerns, up from 56% a year ago.

Another 79% said they consider a company's environmental reputation when buying, the same response rate as a year ago.

But apparently consumers don't have much faith in marketers' current environmental track records. While almost three-fourths of respondents (72%) rated environmental labeling on consumer products as important, only 15% found current environmental packaging claims "extremely or very believable."

Price is now playing more of a role in environmental buying decisions. While most consumers said they would pay more for environmentally safe packaging, the 1991 survey found more price resistance than previously.

This year, 37% of respondents said they would pay 15% more for an environmentally safe package, a significant decrease from 1990, when 47% expressed a willingness to pay 15% more.

As in last year's survey, consumers demonstrated confusion about which products are kind to the Earth.

A full 69% of respondents said they believe plastic packaging contributes most to the solid waste problem, up from 60% a year earlier, but industry officials say that belief is flawed.

Despite the concern about plastic, however, 65% of respondents said they prefer using plastic ketchup bottles (up from 56% last year), and another 61% said they buy milk in plastic containers (up from 56%). While 70% of respondents said they don't buy carbonated beverages packaged in plastic, that figure is lower than last year's 75%.

In other specific product categories, 52% rated toothpaste in a pump as extremely or very harmful to the environment and 51% said frozen entrees in microwaveable dishes are very harmful. Perceived more "friendly" are breakfast cereals in cardboard boxes, rated extremely or very harmful by only 6%; juice in a milk-type carton (13%); and soda in an aluminum can (14%).

Overall, 91% of consumers rate marketers the least concerned about the environment, more so than the U.S. government (86%) and the public (85%).

"Consumers are clearly concerned about the solid waste problem and want to be part of the solution, but they need to see business and government taking action," said Jonathan Asher, Gerstman VP-director of marketing services.

"The fact that 91% of those polled feel that business is not concerned enough about the environment should convince corporate America that it is time to do something," he said.

The survey, conducted in person last June, included 318 female heads of household ages 21 to 59 responsible for household grocery shopping, and was conducted by Joel Benson Associates. Those surveyed live in Ridgewood, N.J.; Dallas; Detroit; San Francisco; Seattle; and Erie, Pa. The margin of error is plus or minus 5%. □

Packaging perceptions

Percent of respondents who said packaging for that product was extremely/very harmful to the environment.

Product	%	Product	%
Toothpaste in a pump	52	Juice in a small drink box	19
Frozen entrees in a tray	51	Juice in a frozen concentrate can	17
Soda in a plastic bottle	47	Ketchup in a glass bottle	16
Ketchup in a plastic bottle	46	Juice in a glass bottle	15
Juice in a steel can	41	Soda in an aluminum can	14
Cold medication in a blister card	37	Juice in a milk-type carton	13
Toothpaste in a tube	36	Cereal in a cardboard box	6
Cold medication in a bottle	24		

Total respondents 318. Source: Gerstman & Meyers

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In fact, research shows newspaper readers to be the heaviest purchasers of everything from travel to appliances, cars to investment advice. And of those who made unplanned purchases (in other words, went on crazy, wild, spur-of-the-moment spending sprees), 60% cited newspapers as the number one reason why. That's right. Newspaper's the culprit. Now isn't that the kind of clout you'd like your advertising dollars to buy?

Newspaper. It's The Best Way To Close A Sale.

Source: [illegible] Response Analysis Corp., as reported in "How America Shops and Buys," 1991

For more information on how newspaper can help you close the sale, call Jim Wilson at (212) 704-4503.

Milk-Bone bites Purina

EAST HANOVER, N.J.—Nabisco Foods Co.'s Milk-Bone dog biscuits is taking an amusingly biting jab at Ralston Purina Co.'s Purina Biscuits in a new network TV commercial that broke last week.

Created by FCB/Leber Katz Partners, New York, the commercial shows a dog asking his unseen master why he's being fed those "new biscuits," adding, "Don't you love me anymore?" The spot states Milk-Bone has half the fat of Purina Biscuits, ending with the dog saying, "Please give me back my Milk-Bone."

Purina last year ran a commercial saying, "If it isn't Purina, bury it in the yard." Martin Marshall Jaccoma Mitchell, New York, handles Purina. □

MEDIA MIX

News briefs on print, electronic and alternative media.

Connoisseur chases consumers. Hearst Magazines is backing its June redesign of *Connoisseur* with a massive circulation-building campaign. The monthly hopes to expand its rate base 56.3%, to 500,000 from 320,000, in two years, said Publisher Carol Ference. The magazine this month breaks a $2 million outdoor, transit and radio campaign in Los Angeles and New York, themed "Art and culture, inside out" and created by the MacDougall Co., New York, and Marc Balet, *Connoisseur* creative director. A 2 million-piece direct mail effort is slated for December, following a similar push in July, and newsstands will carry more copies in more visible displays.

Video ventures in store. Actmedia, Norwalk, Conn., and Klever Kart, Salt Lake City, are developing a video screen for shopping carts similar to Information Resources Inc.'s VideoCart system. The screen will carry pricing information, ads and promotional messages; initial testing is scheduled for early 1992. Separately, Actmedia Canada, Mississauga, Ontario, has purchased Retail Resource Group, a Toronto-based in-store promotion and sales merchandising company.

Lifetime catches Orion's stars. Lifetime Television bought exclusive cable TV rights to 39 films from Orion Television Entertainment, a division of Orion Pictures Corp. Thirteen films—including "Mermaids," "Dances With Wolves," "Alice" and "Silence of the Lambs"—will run on Lifetime before syndication. The other 26 have been in syndication. All the films will make their basic cable TV debut on Lifetime, starting in October 1993.

Snow job. The New York Times Co. Magazine Group unveils a redesign of *Snow Country* with the October issue. The revised cover and pages will allow larger photos and splashier graphics for the eight-times-a-year title. *Snow Country's* September issue was its largest ever for the month, with 89.1 ad pages, up 18.7% from a year before.

Shoppers count in Wal-Mart. Wal-Mart Stores is installing Shoppers Calculator, solar calculators attached to shopping carts and carrying ads. ADDvantage Media Group, Tulsa, Okla., plans to install the device in all Wal-Mart stores and selected Acme and Kroger supermarkets; other chains featuring the calculator include Shop-Rite, Publix, Dierbergs and Homeland supermarkets. ADDvantage sells ad space.

***Snow Country's* October issue is the first under its redesign.**

Branching out. Lear Publishing, publisher of *Lear's*, will launch *Connection*, a monthly, themed newsletter making its debut as a 12-page supplement to the November issue of *Lear's*. Charter subscriptions cost $48 per year. The newsletter will focus on themes such as money, style and business, and initially won't carry ads.

Pump up the volume. Radio ad sales improved in July, posting a 3.1% gain over July 1990, the Radio Advertising Bureau reported. Using an index of stations in 100-plus markets, the bureau found local revenues rose 3.5% and national spending was up only 0.1%. The July performance is an improvement over year-to-date spending, down 3.1% through July.

PBS goes to school. The Public Broadcasting Service has joined Cable in the Classroom, a nonprofit consortium of 43 cable operators and 20 cable networks supplying commercial-free programming to 18,000 junior and senior high schools. Members include Tele-Communications Inc., Cable News Network, the Discovery Channel and the Family Channel; all pay membership fees. □

Joe Mandese coordinates MediaWorks.

Stations reduce research

NEW YORK—The trend among TV stations to choose a single ratings service presents problems for agencies—and for the ratings services.

Nielsen Media Research last month shut down its local metered market ratings service in Detroit and reverted to a diary-based service. It was the first time ever that Nielsen shut down a metered market service.

Nielsen cited economics for the switch. Only one commercial TV station was subscribing to the metered service.

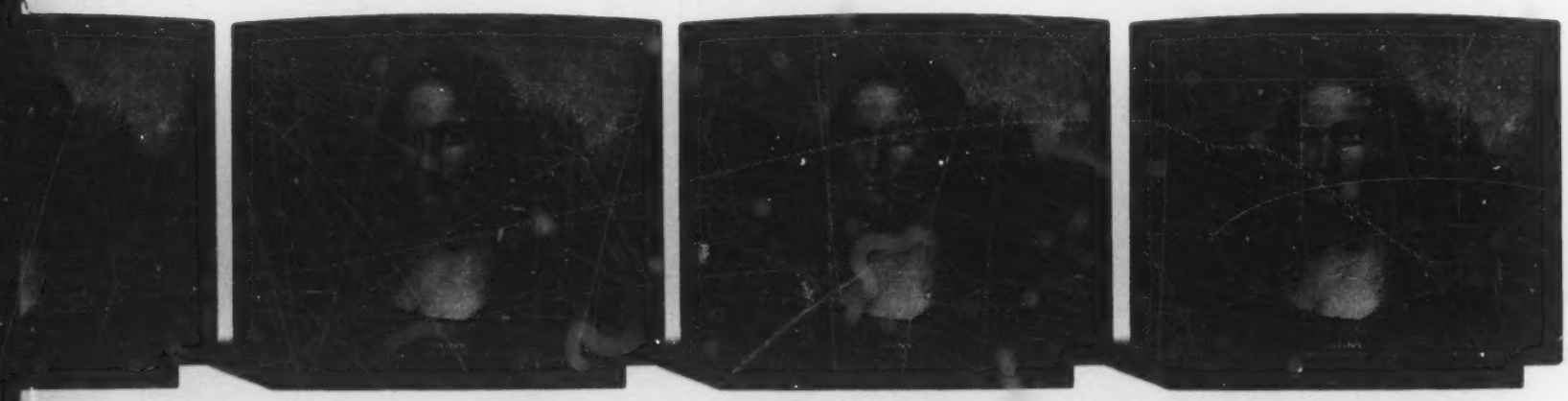
"Agencies are not happy about it," said Joanne Milano, VP-media research director of Lowe & Partners. Nielsen "took a step backward, because meters are a superior way of measuring ratings."

While Nielsen plans to introduce other metered markets soon, the rapidly changing economics of local ratings are becoming all too clear, Ms. Milano said.

A Lowe study found the number of stations subscribing to both Nielsen's and Arbitron's ratings services this year is 347, down 27% from 1989. Nielsen added 85 stations during that period, and carries 414; Arbitron added 51 stations and carries 196.

According to an Arbitron survey of the top 50 ad agencies, 21 use Nielsen 100% of the time and 10 use Arbitron 100% of the time, with the balance using both services to varying degrees.

In 1990, 53% of commercial stations were single service, up from 24% in 1985, Arbitron reported. □



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BUSINESS AND PROFESSIONAL GROUP

Ad ratio gains posted for '91

LINCOLNSHIRE, Ill.—Despite the economic downturn, several industries this year are significantly increasing ad expenditures as a percentage of sales, a study by Schonfeld & Associates found.

Schonfeld sees double-digit percentage increase in ad-to-sales ratios for 11 business sectors.

They are: air courier services (11.7%); bakery products (17.8%); cable and pay TV services (17.7%); dairy products (22.9%); hospital and medical service plans (13.3%); household audio and video equipment (14%); motion picture and videotape distributors (24.8%); periodical publishing and printing companies (22.4%); phonograph records, audiotapes and discs (23.4%); pre-packaged software (16.2%); and videotape rentals (29.8%).

The research is based primarily on 10-K reports filed by publicly held companies, grouped by industries based on four-digit Standard Industry Classification codes. In the 10-K reports listing "advertising" expenditures, companies may include promotion spending as well.

Industries to watch in 1992 include airlines and hotels, where ad spending growth is expected to be only 5% and 6%, respectively.

Besides ad-to-sales ratios, the annual report forecasts 1992 ad spending for more than 5,700 companies, using historical data.

The new study also includes sales growth rates as well as advertising growth rates by company.

Industries to watch in 1992, Schonfeld said, include airlines and hotels, where ad spending growth is expected to be only 5% and 6%, respectively, less than in past years.

This moderation undoubtedly reflects the recent pressure on travel revenues and profits due to the Persian Gulf War.

Health service providers will continue double-digit growth rates in 1992, Schonfeld predicted.

Some service chains now have budgets of more than $25 million and growth rates above 15%. Outpatient service companies still have small ad budgets but show growth above 20%.

In the packaged computer software industry, ad growth will be 16.2% next year, faster than the 7% to 13% growth rates of computer hardware makers, the report found.

Despite industry turmoil, department store chains will spend $4.8 billion, Schonfeld reported. Variety store chains will show stronger ad growth of 8.9%, increasing spending to $3 billion.

Copies of the 203-page study are available for $295 from Schonfeld & Associates, 1 Sherwood Drive, 60069. Phone: (708) 948-8080. □

Advertising-to-sales ratios, 1991

Computed by industry.

Industry	SIC no.	Ad dollars as percent of sales	Ad dollars as percent of margin	Annual growth rate (%)
Abrasive, asbestos, misc minerals	3290	1.1	3.9	(0.4)
Adhesives & sealants	2891	2.7	5.9	9.4
Agriculture chemicals	2870	0.7	3.1	7.4
Agriculture production-crops	100	2.2	7.1	14.3
Air cond, heating, refrig equip	3585	1.7	6.5	(0.9)
Air courier services	4513	1.2	9.9	11.7
Air transport, scheduled	4512	1.9	65.5	5.0
Aircraft & parts	3720	0.6	3.1	3.9
Aircraft parts, aux equip, NEC	3728	0.8	3.1	2.8
Apparel & other finished prods	2300	4.3	11.3	10.1
Apparel & accessory stores	5600	1.9	5.0	5.0
Auto & home supply stores	5531	2.2	8.9	9.2
Auto rent & lease, no drivers	7510	2.4	3.6	6.7
Automatic regulating controls	3822	3.3	11.5	5.8
Bakery products	2050	8.0	47.6	17.8
Beverages	2080	8.6	14.6	8.6
Bldg matl, hardware, garden-retail	5200	4.9	12.9	4.4
Books: pubng, pubng & printing	2731	2.9	6.0	3.8
Broadwoven fabric mill, cotton	2211	4.3	21.7	(1.5)
Btld & canned soft drinks, water	2086	3.0	6.6	6.2
Business services, NEC	7389	2.7	6.5	9.8
Cable & other pay TV services	4841	2.9	6.0	17.7
Can fruit, veg, preserv, jam, jelly	2033	2.6	8.4	14.4
Can, frozen preserv, fruit & veg	2030	7.7	18.9	8.8
Catalog, mail-order houses	5961	6.9	17.7	6.7
Chemicals & allied prods-whsl	5160	4.2	18.0	7.7
Chemicals & allied products	2800	2.3	6.1	12.1
Cigarettes	2111	3.9	6.6	(3.0)
Computer & comp software stores	5734	0.6	3.1	12.3
Computer integrated system design	7373	1.5	4.1	6.2
Computer processing, data prep svc	7374	1.5	2.9	8.4
Commercial printing	2750	2.7	10.4	11.0
Communications equipment, NEC	3669	2.1	4.9	11.3
Computer & office equipment	3570	1.6	3.3	7.1
Computer communication equipment	3576	1.9	4.0	13.1
Computer peripheral equip, NEC	3577	1.9	4.1	13.1
Computer storage devices	3572	1.4	4.8	18.9
Computers & software-wholesale	5045	0.6	5.2	14.4
Construction, mining, matl handle equip	3530	4.4	12.9	7.4
Convert paper, paperbd, ex boxes	2670	2.3	5.2	5.8
Cutlery, hand tools, gen hardware	3420	9.6	18.8	8.7
Dairy products	2020	4.1	11.2	22.9
Department stores	5311	2.8	14.3	4.5
Drug & proprietary stores	5912	1.6	5.6	7.4
Durable goods-wholesale, NEC	5099	3.6	7.6	32.4
Eating places	5812	3.4	17.9	7.8
Educational services	8200	6.9	15.7	11.5
Electrical measure & test instruments	3825	2.6	5.4	4.1
Electr, other elec equip, ex computrs	3600	2.2	5.6	6.2
Electric housewares & fans	3634	5.2	20.0	5.5
Electric lighting, wiring equip	3640	2.5	8.5	9.0
Electromedical apparatus	3845	1.3	2.2	11.2
Electronic comp, accessories	3670	0.7	2.3	9.6
Electronic computers	3571	3.6	7.2	10.3
Electronic parts, equip-whsl, NEC	5065	2.0	7.5	5.7
Engines & turbines	3510	1.3	6.6	(13.2)
Engr, acc, resrch, mgnt, rel svcs	8700	1.4	6.7	2.0
Equip rental & leasing, NEC	7359	0.7	2.4	4.5
Fabricated plate work	3443	1.0	3.7	10.2
Fabricated rubber products, NEC	3060	0.7	3.9	41.8
Facilities support mgmt svcs	8744	1.9	11.6	14.6
Family clothing stores	5651	2.3	6.8	12.8
Farm machinery & equipment	3523	1.1	4.5	6.6
Finance-services	6199	0.8	6.9	3.6
Food & kindred products	2000	6.3	14.9	9.6
Footwear, except rubber	3140	4.8	11.9	8.9
Functions rel to dep banking, NEC	6099	6.0	55.8	8.5
Furniture & home furnish-wholesale	5020	6.6	22.9	(14.6)
Furniture stores	5712	7.6	15.8	6.3
Games, toys, child veh, ex dolls	3944	16.3	33.5	9.9
Gen med & surgical hospitals	8062	0.3	1.7	(2.4)
Gen industrial machine & equip	3560	1.9	6.6	12.4
Glass, glassware-pressed, blown	3220	1.7	3.9	12.5
Grain mill products	2040	9.4	19.6	6.8
Greeting cards	2771	5.3	8.7	7.9
Groceries & related prods-whsl	5140	1.3	8.8	7.4
Grocery stores	5411	1.2	4.7	4.4
Guided missiles & space vehc	3760	1.3	7.4	(3.1)
Hardware, plumb, heat equip-whsl	5070	1.8	14.3	6.3
Help supply services	7363	1.7	7.5	10.1
Hobby, toy & game shops	5945	1.8	5.5	10.0
Home furniture & equip stores	5700	4.4	13.4	13.1
Hospital & medical svc plans	6324	0.9	5.4	13.3
Hospitals	8060	5.2	34.7	8.9
Hotels, motels, tourist courts	7011	3.9	13.8	6.0
Household appliances	3630	2.1	11.1	11.8
Household audio & video equip	3651	5.1	12.2	14.0
Household furniture	2510	3.8	13.9	11.2
Ice cream & frozen desserts	2024	5.6	21.1	13.4
Industrial inorganic chemicals	2810	19.4	44.2	7.6
Indl trucks, tractors, trailers	3537	0.9	3.8	7.4
Industrial measurement instr	3823	1.9	4.9	6.4
Industrial organic chemicals	2860	1.6	5.6	0.9
Investment advice	6282	8.0	21.6	5.3
Iron & steel foundries	3320	1.6	5.8	8.3
Jewelry stores	5944	2.8	8.2	11.4
Jewelry, precious metals	3911	2.3	5.5	8.7
Knit outerwear mills	2253	1.3	3.8	7.6
Knitting mills	2250	5.8	17.2	7.7
Lab analytical instruments	3826	2.0	3.4	4.6
Lab apparatus & furniture	3821	2.6	7.3	14.5
Lawn, garden tractors & equip	3524	1.9	7.3	13.6
Lumber & other bldg matls-retail	5211	1.9	6.5	3.9
Machine tools, metal cutting	3541	1.1	4.4	1.4
Magnetic, optic recording media	3695	3.8	9.3	2.6
Malt beverages	2082	4.9	16.5	10.9
Measuring & control devices, NEC	3829	1.1	3.2	13.2
Meat packing plants	2011	1.7	15.7	12.4
Men, youth, boys frnsh, work clthg	2320	2.8	8.4	8.4
Metal forgings & stampings	3460	4.5	16.8	16.0
Metalworking machinery & equip	3540	3.8	10.0	6.3
Misc amusement & rec services	7990	5.7	16.7	11.4
Misc business services	7380	1.1	2.3	8.5
Misc chemical products	2890	5.7	13.6	6.8
Misc elec machine, equip, supplies	3690	2.3	5.2	0.7
Misc fabricated metal products	3490	0.9	3.4	5.5
Misc food preps, kindred products	2090	3.2	7.9	4.9
Misc gen merchandise stores	5399	3.0	11.4	4.6
Misc industl, comml machine & equip	3590	1.5	3.2	9.2
Misc manufacturing industries	3990	3.5	9.1	9.8
Misc shopping goods stores	5940	2.7	7.1	(0.1)
Misc transportation equipment	3790	5.1	16.5	29.9
Motion picture, videotape prodctn	7812	13.2	23.9	9.2
Motion picture, videotape distr	7822	7.7	22.9	24.8
Motion picture theaters	7830	5.2	75.5	3.3
Motor homes	3716	1.0	5.0	(9.5)
Motor vehicle parts, supply-whsl	5010	1.0	6.1	1.9
Motor vehicle parts & accessories	3714	0.9	3.8	3.6
Motor vehicles & car bodies	3711	2.2	12.2	11.0
Motors & generators	3621	0.9	2.5	7.0
Newpapers: pubg, pubg & print	2711	3.1	8.3	6.0
Office machines, NEC	3579	2.0	6.6	6.8
Operative builders	1531	1.6	13.6	1.9
Operators, non-res buildings	6512	2.3	5.6	6.2
Ophthalmic goods	3851	9.9	17.1	14.5
Ortho, prosth, surgical appl, supply	3842	2.2	4.8	7.5
Paints, varnishes, lacquers	2851	2.6	6.9	11.3
Paper & paper products-whsl	5110	2.8	12.0	22.0
Paper mills	2621	1.1	3.9	11.6
Pens, pencils, other office matl	3950	5.7	12.1	10.4
Perfume, cosmetic, toilet prep	2844	10.1	16.5	8.0
Periodical: pubg, pubg & print	2721	5.8	13.5	22.4
Personal credit institutions	6141	0.9	2.1	9.1
Personal services	7200	7.2	17.0	7.3
Petroleum refining	2911	2.1	8.0	(4.6)
Pharmaceutical preparations	2834	6.1	8.9	9.8
Phone commun, ex radiotelephone	4813	2.3	4.9	3.1
Phono records, audiotape, disc	3652	10.2	20.9	23.4
Photofinishing laboratories	7384	3.3	9.2	2.9
Photographic equip & supply	3861	4.1	10.8	12.0
Plastic matl, synthetic resin	2820	1.3	4.5	1.3
Plastics products, NEC	3089	2.3	6.1	7.4
Plastics, resins, elastomers	2821	0.7	2.4	(2.3)
Pottery & related products	3260	5.6	14.6	19.4
Poultry slaughter & processing	2015	2.1	11.1	14.9
Prepackaged software	7372	3.3	5.2	16.2
Printing trades machy & equip	3555	1.4	4.3	12.9
Pumps & pumping equipment	3561	0.8	2.6	2.9
Radio broadcasting stations	4832	9.9	23.6	13.9
Radio, TV, broadcast comm equip	3663	1.1	3.0	9.7
Radio, TV, cons electr stores	5731	5.8	23.0	8.2
Radiotelephone communications	4812	2.9	6.0	20.8
Railroads, line-haul operatns	4011	0.7	3.2	38.2
Real estate investment trust	6798	0.7	0.9	1.7
Record & tape stores	5735	1.2	3.0	12.4
Refrig & service ind machine	3580	1.8	5.0	4.4
Retail stores	5990	6.9	20.0	17.2
Rubber & plastics footwear	3021	6.9	17.4	18.1
Sausage & other prep meat prods	2013	8.4	25.5	10.7
Savings instns, fed chartered	6035	0.7	2.7	2.8
Securities brokers & dealers	6211	2.8	22.8	3.5
Semiconductor, related devices	3674	1.0	2.5	3.2
Sheet metal work	3444	3.0	14.4	(4.4)
Ship & boat bldg & repairing	3730	4.8	57.7	6.9
Shoe stores	5661	0.9	2.5	(3.5)
Skilled nursing care facilities	8051	2.7	19.9	7.3
Soap, detergent, toilet preps	2840	7.8	17.6	8.0
Special clean, polish preps	2842	16.3	29.5	9.3
Special industry machinery	3550	5.6	26.2	11.2
Special industry machnry, NEC	3559	1.1	2.5	10.5
Sporting & athletic goods, NEC	3949	4.0	11.8	5.2
Search, det, nav, guid, aero systems	3812	0.1	0.4	9.2
Subdividers, develp, ex cemetery	6552	5.6	23.8	29.9
Sugar & confectionery prods	2060	10.5	28.0	12.2
Surgical, med, instr, apparatus	3841	1.4	2.6	8.1
Switchgear & switchboard app	3613	1.9	4.9	13.7
Telephone & telegraph app	3661	1.0	2.2	4.4
Television broadcast stations	4833	3.1	9.4	10.1
Textile mill products	2200	1.8	10.1	4.1
Tires & inner tubes	3011	4.1	15.6	2.0
Tobacco products	2100	1.4	3.0	4.8
Transit & passenger trains	4100	1.6	24.5	11.7
Unsupp plastics film & sheet	3081	3.7	10.3	8.1
Variety stores	5331	1.9	7.8	7.1
Videotape rental	7841	4.7	9.5	29.8
Water transportation	4400	7.2	18.1	4.4
Wmns, miss, child, infnt undergrmnt	2340	6.2	13.5	5.5
Women's clothing stores	5621	3.3	8.6	10.1
Women's, misses, jrs outerwear	2330	2.7	8.8	12.3
Wood hshld furn, ex upholsrd	2511	3.9	12.2	11.3

Source: Schonfeld & Associates, 1 Sherwood Drive, Lincolnshire, Ill. 60069. (708) 948-8080. Legend: SIC = Standard industrial classification. NEC = Not elsewhere classified. Ad dollars as percent of sales: Ad expenditures/net sales. Ad dollars as percent of margin: Ad expenditures/(net sales – cost of goods sold). Annual growth rate of advertising dollars.

Specialty shops spice up sales for pet foods

By John C. Maxwell Jr.

Pet food sales through specialty outlets and veterinarians grew 10% to nearly $1.1 billion last year, outpacing other outlets' gain of 2.8% to $6.4 billion.

That put industrywide sales at $7.5 billion, up about 4% from 1989.

MAXWELL REPORT

Dollar sales gains should continue to outpace volume growth as companies aggressively "trend up" product lines. Unit growth through grocery store channels was down 1% to 2%, with volume gains coming from non-grocery outlets such as discount stores, pet shops and feed stores at the expense of supermarkets.

It's estimated pet food sales through non-grocery outlets now account for 20% of total industry sales and will keep growing. But near-term gains by non-grocery outlets will be blunted by aggressive introduction of nutritional/prescriptive new products by grocery-oriented marketers.

Such products will get trial because of large ad budgets and prices lower than pet store and veterinary products.

Hill's Pet Products and Iams Co. dominate the specialty segment of the market, with Hill's estimated at $575 million in retail sales in 1990 and Iams at an estimated $275 million.

Product introductions reportedly hit a high last year. And discounting was in abundance as marketers such as Alpo Petfoods and Kal Kan Pet Care tried to gain market share during limited volume growth.

Looking at share performance, Ralston Purina Co.'s decline continued, falling 1.2 points from 1989, but it was still a strong leader with a 25.8% market share.

Nestle's Friskies PetCare Products, in the No. 2 position, was flat at 14%. Mars Inc.'s Kal Kan, primarily due to the success of its Pedigree dog food line, moved ahead of Heinz, going to 12.5% from 11.7%.

It's estimated pet food sales through non-grocery outlets now account for 20% of total industry sales and will keep growing.

Heinz Pet Products dropped slightly to 11.6% from 12%, and Grand Metropolitan's Alpo moved ahead 1.8 points to 9.4%, aided by the successful rollout of the Garfield cat food line.

Quaker Oats Co.'s share fell to 8.4% from 10.9% of the market as a result of weak sales of its moist and soft-dry dog food products. □

Mr. Maxwell is an analyst with Wheat, First Securities, Richmond, Va.

Pet food sales

Annual pet food sales by category. Dollars are in millions.

DRY DOG FOOD	Marketer	1989	1990
Dog Chow	Ralston Purina	$260.8	$257.0
Puppy Chow	Ralston Purina	150.0	155.0
Alpo Regular Dinner	Alpo (Grand Met USA)	117.3	110.0
Come'N Get It	Carnation (Nestle USA)	90.2	91.5
Gravy Train	Gaines (Quaker Oats)	91.2	85.6
Meal Time	Kal Kan (Mars)	86.4	80.0
Hi-Pro Dog Meal	Ralston Purina	69.2	72.3
Field Trial	American Pet	50.7	60.5
Kibbles & Chunks	Ralston Purina	63.3	59.7
O.N.E.	Ralston Purina	47.2	51.9
Dry Cycle	Gaines (Quaker Oats)	49.1	51.0
Grrravy	Ralston Purina	47.0	47.0
Chuck Wagon	Ralston Purina	47.5	45.5
Pro Plan	Ralston Purina	26.0	40.0
Hearty Chunks	Quaker Oats	37.0	39.0
Mainstay	Ralston Purina	41.2	37.5
Fit & Trim	Ralston Purina	36.0	37.3
Lucky Dog	Ralston Purina	30.0	26.0
Sunshine	American Pet	21.4	25.0
Dad's	Dad's Products	23.6	24.8
Trail Blazer	Martha White	20.2	21.0
Purina Blends	Ralston Purina	24.3	18.0
Jim Dandy Classic Dinner	Jim Dandy (Grand Met USA)	15.6	17.0
Atta Boy	American Nutrition	13.2	14.0
Prime	Ralston Purina	12.5	13.0
Hunters Choice	Jim Dandy (Grand Met USA)	12.8	12.0
Friskies Dinner & Cubes	Carnation (Nestle USA)	12.1	10.3
Pedigree Puppy	Kal Kan (Mars)	—	9.5
Alpo Puppy	Alpo (Grand Met USA)	11.4	8.5
Puppy Chow Chewy Morsels	Ralston Purina	12.5	8.5
Tuffy	Heinz	9.0	8.1
Field Master	Ralston Purina	7.0	8.0
Bench and Field	Martin Feed Mills	5.1	6.0
Beef Complete	Ralston Purina	4.8	6.0
Blue Mountain	Associated Products	4.4	5.0
Kasco	Piasa	4.3	3.8
Field & Farm	Ralston Purina	2.7	3.1
Sturdy	Heinz	2.4	2.2
Ken-L Ration Biscuit & Meal	Quaker Oats	3.7	2.0
Strongheart	Strongheart	1.6	2.0
Cadillac	Cadillac	2.2	1.8
Bow Wow	Piasa	2.8	1.7
Meaty Meal	Heinz	1.5	1.7
Gravy Train Puppy	Gaines (Quaker Oats)	2.0	1.5
Vet Nuggets	Heinz	1.1	0.8
Savor	Ralston Purina	0.5	—
Gaines Meal	Gaines (Quaker Oats)	0.3	—
Thrive	Ralston Purina	2.5	—
All others		316.4	387.9
Total		**$1,876.0**	**$1,970.0**

CANNED DOG FOOD			
Kal Kan Pedigree	Kal Kan (Mars)	$250.0	$265.0
Alpo	Alpo (Grand Met USA)	263.5	255.0
Mighty Dog	Carnation (Nestle USA)	89.4	95.3
Skippy Premium	Heinz	52.5	55.7
Cycle	Gaines (Quaker Oats)	60.5	63.5
Grand Gourmet	Carnation (Nestle USA)	68.8	57.3
Pedigree Choice Cuts	Kal Kan (Mars)	11.5	46.0
Pedigree Select Dinners	Kal Kan (Mars)	36.0	40.0
King Kuts	Quaker Oats	38.7	33.0
Ken-L Ration	Quaker Oats	35.8	31.7
Recipe	Heinz	24.0	23.3
Vets	Heinz	15.3	17.4
Cavalier	Cadillac	14.0	14.5
Twin Pet	Allied Foods	13.5	14.0
Alpo Puppy	Alpo (Grand Met USA)	8.7	9.7
Pedigree Puppy	Kal Kan (Mars)	—	7.0
Gravy Train	Gaines (Quaker Oats)	7.5	6.0
Blue Mountain	Alpo (Grand Met USA)	7.0	6.0
Strongheart	Strongheart	5.0	4.8
Reward	Heinz	3.0	3.5
Skippy	Heinz	4.1	2.0
Laddie Boy	Laddie Pet Food	2.8	2.0
Bone Appetit	Ralston Purina	1.5	—
MPS	Kal Kan (Mars)	0.7	—
All others		4.2	51.3
Total		**$1,090.0**	**$1,115.0**

SOFT-DRY DOG FOOD			
Kibbles 'n Bits 'n Bits 'n Bits	Quaker Oats	$140.0	$130.0
Tender Chops	Quaker Oats	42.5	42.5
Moist & Chunky	Ralston Purina	12.7	7.0
Puppy Kibbles 'n Bits 'n Bits 'n Bits	Quaker Oats	8.6	6.5
Dinner Rounds	Heinz	5.0	4.8
Jim Dandy Tender Moist Chunks	Jim Dandy (Grand Met USA)	3.2	4.2
Total		**$225.0**	**$195.0**

DOG TREATS			
Milk-Bone & others	RJR Nabisco	$167.7	$168.0
Jerky Treats	Heinz	46.0	53.0
Meaty Bones	Heinz	37.0	32.7
Superior Brands products	Carnation (Nestle USA)	31.3	28.6
Purina Biscuits	Ralston Purina	12.0	24.0
Bonz	Ralston Purina	21.5	19.9
Pup-peroni	Quaker Oats	14.0	17.9
Alpo Snaps	Alpo (Grand Met USA)	12.2	12.8
Beef Bites	Alpo (Grand Met USA)	10.7	12.0
Snausages	Quaker Oats	10.0	11.7
Alpo Jerky	Alpo (Grand Met USA)	12.5	10.8
Hearty Chews	Ralston Purina	13.0	10.0
Beggin' Strips	Ralston Purina	7.0	9.0
Ribz	Ralston Purina	9.0	6.4
100% Natural Treat	Quaker Oats	4.5	4.3
Stew Biscuits	Alpo (Grand Met USA)	4.2	2.8
Marrow Bone	Kal Kan (Mars)	2.0	2.5
Cheese Dawgs	Ralston Purina	3.5	2.0
Pet-Life products	Pet-Life	1.2	1.2
Recipe	Heinz	0.8	0.9
All others		29.9	49.5
Total		**$450.0**	**$460.0**

MOIST DOG FOOD			
Moist & Meaty	Ralston Purina	$37.9	$41.0
Gaines-Burgers	Gaines (Quaker Oats)	29.5	18.5
Ken-L Ration Special Cuts	Quaker Oats	14.5	11.0
Smorgasburger	Quaker Oats	13.0	11.0
Ken-L Ration Cheeseburger	Quaker Oats	10.4	9.0
Moist & Beefy	Quaker Oats	8.0	7.0
Top Choice	Gaines (Quaker Oats)	7.6	3.5
Ken-L Burgers	Quaker Oats	3.5	2.1
Prime/Puppy Choice	Gaines (Quaker Oats)	0.8	—
All others		40.7	39.9
Total		**$165.0**	**$143.0**

CANNED CAT FOOD	Marketer	1989	1990
9 Lives	Heinz	$260.0	$245.0
Friskies Buffet	Carnation (Nestle USA)	255.0	236.3
Whiskas	Kal Kan (Mars)	235.0	220.0
Fancy Feast	Carnation (Nestle USA)	168.0	169.0
Alpo Premium	Alpo (Grand Met USA)	17.7	125.0
Amore	Heinz	100.0	80.0
Purina Premium	Ralston Purina	81.3	75.0
Kozy Kitten	Heinz	40.0	50.0
Sheba	Kal Kan (Mars)	45.0	45.0
Fresh Catch	Carnation (Nestle USA)	8.6	30.8
Puss 'n Boots	Quaker Oats	24.9	22.0
Whiskas Select	Kal Kan (Mars)	—	12.1
Friskies Kitten	Carnation (Nestle USA)	—	10.2
9 Lives Kitten Dinners	Heinz	4.5	8.6
Unique	Ralston Purina	8.3	8.5
Bright Eyes	Carnation (Nestle USA)	7.8	4.6
Twin Pet	Allied	3.0	3.0
Kitty	Allied	3.0	3.0
Catviar	Ralston Purina	5.0	2.5
Naturally Twin	Allied	2.5	2.5
Alpo Slices in Gravy	Alpo (Grand Met USA)	—	1.7
Tabby	Alpo (Grand Met USA)	0.3	—
All others		61.1	35.2
Total		**$1,351.0**	**$1,390.0**

DRY CAT FOOD			
Cat Chow	Ralston Purina	$149.5	$145.6
Friskies	Carnation (Nestle USA)	116.0	114.9
Meow Mix	Ralston Purina	86.0	78.0
Whiskas	Kal Kan (Mars)	80.0	74.0
Kozy Kitten	Heinz	55.0	60.0
Alley Cat	Ralston Purina	54.5	56.5
9 Lives	Heinz	55.4	59.7
Alpo Gourmet Dinner	Alpo (Grand Met USA)	7.4	44.8
Kitten Chow	Ralston Purina	43.5	38.5
Chef's Blend	Carnation (Nestle USA)	38.5	35.3
Special Dinners	Ralston Purina	36.9	29.0
Deli-Cat	Ralston Purina	—	22.0
Smart Cat	Ralston Purina	21.3	17.5
Thrive	Ralston Purina	24.2	16.8
Kitten Chow Dairy Formula	Ralston Purina	9.9	11.5
Friskies Kitten Formula	Carnation (Nestle USA)	10.0	8.6
Cat Menu	Ralston Purina	—	7.1
Purina Select	Ralston Purina	3.4	4.0
O.N.E.	Ralston Purina	—	0.3
Cat Chow Plus	Ralston Purina	0.3	0.1
All others		68.2	69.3
Total		**$960.0**	**$886.5**

MOIST CAT FOOD			
Tender Vittles	Ralston Purina	$103.2	$98.5
Happy Cat	Ralston Purina	38.1	27.0
9 Lives Tender Meals	Heinz	25.0	23.5
Moist Meals	Quaker Oats	3.0	1.5
Moist & Tender	Ralston Purina	0.5	—
All others		30.2	19.5
Total		**$200.0**	**$170.0**

CAT TREATS			
Pounce	Quaker Oats	$10.5	$8.5
Bonkers	Beatrice	7.0	7.0
9 Lives Finicky Bits	Heinz	3.5	4.0
Whisker Lickins	Ralston Purina	3.0	3.0
Others		2.0	12.0
Total		**$26.0**	**$34.5**

Source: Wheat, First Securities

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41A25

Ingersoll seeks European boost

By Elena Bowes

LONDON—Ralph Ingersoll, the U.S. publisher who owns U.K. and Irish newspapers through Ingersoll Publications, is talking with European publishing groups and U.K. financial institutions about recapitalization.

Mr. Ingersoll, who bought the Birmingham Post & Mail Group and *Coventry Evening Telegraph* in 1987 for about $100 million, said he'd like to sell a significant minority share of the Birmingham company by yearend but wouldn't name potential candidates. He said he'd like to raise $68 million through recapitalization.

Mr. Ingersoll said he'd like to use at least part of the money to invest in European titles, especially in the German-language sector.

He denied reports he's negotiating to sell the entire regional newspaper group.

The group includes the *Birmingham Post, Evening Mail, Sunday Mercury, Coventry Evening Telegraph* and 50% of the Irish Press Newspapers chain.

Six financial and editorial executives from the regional group approached Mr. Ingersoll about a management buyout but he said he isn't interested.

Mr. Ingersoll came to the U.K. to run the papers as part of an agreement that removed him as head of Ingersoll Publications' U.S. papers in July 1990, following the failure of his *St. Louis Sun* and the company's financial problems. The U.S. company, which has gone through its own restructuring, has since been renamed the Journal Co. □

Turner forges multimedia packages

By Alison Fahey

Turner Broadcasting System is aggressively pitching media packages that combine cable TV, home video and book publishing.

"Turner Broadcasting really does have the ability now to offer mini-media packages," said Terry Cunningham, VP-sales promotion at Turner Broadcasting Sales, the unit that oversees corporate ad sales.

Created in July 1986, Turner Home Entertainment distributes and markets home videos and has access to more than 1,400 movie titles. Turner Publishing, formed in November 1989, develops and markets books related to news and entertainment programming on Turner's four cable networks: Cable News Network, Headline News, TBS and Turner Network Television.

Turner has crafted some multimedia packages before, but the strategy has become a part of the company's "corporate philosophy" since the home video and book publishing divisions have grown, Mr. Cunningham said.

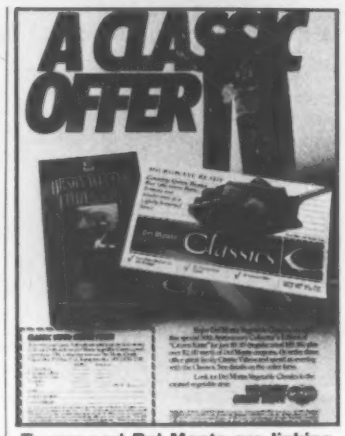
Such packages allow marketers to sponsor the release of a videocassette and be part of a supporting promotion. Turner would back the promotion with spots mentioning the sponsor on its cable networks.

The marketer could also be mentioned in a Turner-published book related to the movie and run its own commercials on some or all of Turner's cable networks.

"We have 17 [sponsorship] opportunities for 1992 that involve our home video and/or our publishing division," said Lou LaTorre, exec VP-sales, Turner Entertainment Networks, the unit that houses TNT and TBS, Turner's entertainment cable networks.

Turner recently sold one new multimedia sponsorship package to Del Monte Foods. It ties Del Monte's Vegetable Classics brand to a 50th anniversary edition home video of "Citizen Kane."

As part of the deal, a Del Monte commercial airs at the start of the videocassette, and the company is being mentioned in 15- and 30-second on-air promo spots on Turner networks.



Turner and Del Monte are linking up in a classic promotion.

The promotional spots broke late last month and tell consumers to look for a special offer in retail video stores and in national free standing inserts.

The first FSI, headlined "A classic offer," ran Sept. 8 and offers consumers a special deal on "Citizen Kane" and three other videos from Turner with proofs-of-purchase from Del Monte Vegetable Classics.

Del Monte will support the promotion, running through yearend, with additional FSIs and in-store ads.

Del Monte has allocated its entire cable budget for the next two quarters to Turner networks, Mr. Cunningham said, but declined to release specific dollar amounts.

McCann-Erickson Worldwide, San Francisco, is Del Monte's agency and helped develop the media and promotional package.

Turner is shopping another package called "Save the Earth," centered on special environmental programming blocks set to be telecast on TBS next February and May.

Sponsoring marketers would get tagged on promo spots and could tie into a related video and book to be published in more than 120 countries.

Another sponsorship deal involves the video release marking the 50th anniversary of "Casablanca," scheduled for second quarter 1992, where advertisers could hook up with the video and a related book.

Turner has presented proposals to Saatchi & Saatchi Advertising, New York, and the agency is evaluating the packages for its clients, said Betsy Frank, Saatchi's senior VP-director of TV information and new media.

Saatchi buys TV time for such clients as Procter & Gamble Co., a leading cable TV spender.

Eventually, the packages will include Turner's newer, place-based media ventures, such as Checkout Channel and Airport Channel.

Checkout Channel is a TV medium situated at supermarket checkout lanes; Airport Channel is a similar network located in airport departure terminals. Both services are in test.

Turner is also discussing the creation of customized media packages with several publishing companies.

"You're going to see a lot more cross-promotional opportunities for marketers, specifically by tying in with publications," Mr. Cunningham said. □

Buyers

(Continued from Page 3)

Advertising, and Y&R will start pitching media services alongside those of the major independent buyers through the Media Service Register, a new venture of the Advertising Agency Register.

Those agencies and others have produced slick presentation tapes of their media credentials that AAR will send to 3,000 clients.

"Our biggest competition is not other independents, it is the [ad] agencies," Mr. Staab said.

Since agencies must maintain fully staffed media departments, their costs are fixed and any new media billings are incremental, he said. As a result, agencies can often "outbid" independents on commission rates because their margins are better, he said.

Still, independents are increasing billings at a faster rate than full-service agencies.

No. 1 independent Western International Media, Los Angeles, recently has picked up buying assignments from Bally Manufacturing Co. and Vons Cos. It was also instrumental in helping Walt Disney Co. place $100 million with Carat Espace, Paris.

SFM appears to be narrowing the gap. While Western International claims billings of nearly $1 billion, industry executives say it's actually about $700 million.

Moreover, the majority of Western International's billings comes from buying media for small ad agencies that don't maintain their own buying departments.

SFM, on the other hand, primarily handles advertisers' national accounts directly. □

Kroger Atlanta splits account 4 ways

ATLANTA—The full-service ad agency concept took a hit last week when the regional Kroger Food Stores account was split among several small boutiques.

Finalists at various points in the competition to succeed former national agency Campbell-Mithun-Esty, Chicago, included Austin Kelley Advertising, Fitzgerald & Co., McCann-Erickson Worldwide, J. Walter Thompson USA and Ross Roy Inc., all here, plus W.B. Doner & Co., Baltimore.

But creative responsibility for the account, with an estimated $8 million to $10 million in annual spending for TV and radio, was given to Creative Consultants, a two-person creative boutique. Media planning and buying was assigned to Massotti's Media Services, and Metier Marketing was assigned strategic planning, communication development and research. Phelan & Lowry was hired for special promotions and community and employee relations programs.

Kroger had asked finalists to present a "menu" of their services, from which the retailer said it would pick and choose services. Austin Kelley, Doner and Fitzgerald withdrew from the competition at that point, a Kroger source said. JWT also withdrew, but because its Los Angeles office was pursuing the Safeway Stores account.

"None of the [big] agencies really got the gist of what was asked of them," this source said. "They were asked for a portfolio of services and were told, 'You'll be paid well for your services, but you won't be paid on a traditional percentage basis for anything.' "

The Kroger Atlanta account, one of the chain's largest, is the fourth region lost by CME since the supermarket decided to decentralize its broadcast advertising function this summer. The national account was valued at $22 million.

Kroger regions in Indianapolis; Nashville, Tenn.; and Roanoke, Va., have retained CME.

CME is still a finalist in the Columbus, Ohio, region's review, but not in Memphis, Tenn.; no decision has been made by the Detroit or Louisville, Ky., regions. □

Ayer

(Continued from Page 3)

McCann, then represented in 46 countries.

But when Ayer lost Pan Am to Doyle Dane Bernbach in 1981, 20 associate agencies left the network.

Ayer later that year won the $10 million Deere & Co. account in Europe, Africa and the Middle East, and Chairman Louis Hagopian spoke of plans to spend heavily to rebuild by buying majority stakes in its overseas agencies.

But it was already too late.

Ayer was dropped by Nestle, one of the first big clients to align its agencies internationally. It lost a shoot-out for the $40 million Goodyear Tire & Rubber Co. account to JWT, and potential global business from clients AT&T Co. and Gillette Co. never developed. Today, Ayer handles Procter & Gamble Co. business, but only in the U.S.

Throughout the '80s, many independent agencies sold themselves to gain international networks. Ayer nearly merged with D'Arcy MacManus Masius in 1985, but Benton & Bowles beat it to the altar.

So despite having spent millions, Ayer appears to have been left behind, with minimal presence in Asia and Latin America. Its European network ranks in the top 10 shops only in Spain.

The U.K. in particular is a problem, because it's often the focus of pan-European assignments.

In London, Ayer has been sliding from No. 36 in 1988 to No. 43 in 1990 with billings of $60 million, putting it behind all other U.S. agencies in London except relative newcomers Bozell and Chiat/Day/Mojo.

Ayer has been tinkering with the London agency for several years and has been looking for an acquisition to beef it up.

But other agencies have already found solutions to similar problems in the past few years.

Lintas:Worldwide and BBDO Worldwide, among others, have found themselves with such feeble London agencies that they couldn't hold onto international business or win local clients in the U.K.

Both bought into excellent local agencies and are now thriving as Still Price:Lintas and Abbott Mead Vickers/BBDO.

Similarly, TBWA Holmes Knight Ritchie and BMP DDB Needham are far stronger agencies than TBWA and DDB Needham Worldwide used to be in the U.K.

To find a solution, Dick Hedger, 53, was hired earlier this year as chairman-ceo of Ayer Europe.

The former Saatchi & Saatchi executive is energetically pursuing his job, but it's unclear whether he's looking to buy more agencies, sell existing ones or merely foster an Ayer network spirit in Europe.

Recently, several Ayer executives in Europe have mentioned the possibility of a European management buyback, among other options, though others have denied they've heard the idea.

Last week, executives for Wilkens Ayer, Hamburg, were unavailable to elaborate on any buyout proposals.

Mr. Hedger is on the road so much even his secretary isn't sure where he's off to next.

"He was in two places in Germany yesterday and he's in Holland today," she said. "Then he's going . . . uh . . . somewhere else."

One London agency executive said he might be interested in having talks with Ayer, except that he couldn't reach Mr. Hedger.

Mr. Hedger didn't return phone calls last week. In an interview in May in New York, shortly after starting his new job, he said: "Ayer bought a number of good agencies. Still, the agencies that Ayer bought are not really Ayer."

He said his first objective is to make them "really Ayer." And "not to take away the good things" the agencies do.

Eight of Ayer's 15 agencies in Europe are affiliates in which Ayer has no equity. Ayer has a minority stake in France and Portugal and owns a majority in Spain, Italy and Germany. The U.K. shop is the only agency in Europe Ayer owns 100%.

Despite sharing some accounts, the agencies don't really operate as a network, so Mr. Hedger sees his job "to consolidate as a network."

The reputation of Ayer—which is No. 19 among the top 20 European agency networks when ranked by gross income by equity—"is not bad," he said. "It's just not strong. It's not top of mind."

Outside London, there are bright spots: Ayer owns a majority in one of Spain's best agencies, TAPSA/N W Ayer, and is also a majority shareholder in creative, fast growing shops in Italy and Germany.

Of Ayer's few pan-European clients, Spanish automaker SEAT and Iberia Air Lines of Spain are there largely because of Ayer's strong Spanish agency.

And Wilkens Ayer in Germany brought in the Beiersdorf business, now held in six European countries and Mexico.

Fernando Ocana, chairman of TAPSA/N W Ayer, Madrid, said Mr. Siano is always open to ways of improving the European network.

"Ayer has never been 100% multinational owned, it's always had local participation," he said. "Ayer and Jerry Siano have always wanted their key people to participate more and more, in Europe and globally."

In the Asia/Pacific region, Ayer's sale of its New Zealand agency this summer completed a withdrawal that started in 1989 when the U.S. agency sold back its 49% stake in Connaghan & May Ayer, Sydney, to local management.

"Ayer's lack of global business at this end of the world determined our decision to sell," Pip Muir, former ceo of Ayer New Zealand, Auckland, said in July when Ayer sold its New Zealand operation to Walkers Advertising.

Contacted in New York last week, Ms. Muir, who's exploring future opportunities at Ayer, said: "From Ayer's point of view, it was not a competitive network [in the Asia/Pacific region]. It was a good time to sell. We had created an excellent, high creative profile." □

Contributing to this story: Nancy Giges, Geoffrey Lee Martin, Anna Masera, Bruce Crumley and Dagmar Mussey.

NOTE

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Tony Orlf

Holiday shoppers to go downscale

Economy dulls sparkle of upscale gifts

An Advertising Age roundup

It's beginning to look a lot like a lean Christmas.

Downscale is in, along with mass merchandisers, warehouse clubs and outlet stores, retail insiders say.

Out are high-end designer names, department stores like Neiman Marcus Co. and Saks Fifth Avenue, and upscale specialty retailers like Sharper Image Corp., Williams-Sonoma and Hammacher, Schlemmer & Co.

HOLIDAY MARKETING

"Stores like Kmart, Radio Shack and warehouse bed and bath shops will be filled this holiday season, but people are going to eschew pricey items and expensive labels," said Kurt Barnard, publisher of *Retail Marketing Report*. "This is the kind of Christmas where people stay home and make things rather than eating out and dressing up."

Consumer confidence remains extremely low due to the recession, and though economists predict a gradual improvement, no immediate economic upturn is expected.

In a national survey conducted last month by Leo J. Shapiro & Associates, 40% said they expect to spend less on gift-giving this year than they did last year, while 30% expect to spend more and 30% expect to spend the same. That's a gloomier forecast than the August 1990 survey, when 34% expected to spend less. The survey was conducted among a national sample of households, with 450 people participat-

(Continued on Page 44)

Fight looms over TV clutter

Agencies say CBS move voids upfront deals

By Joe Mandese

Major ad agencies are on the warpath against the rise in commercial clutter on network TV and are threatening to renegotiate their upfront buys.

Setting off their wrath was CBS, which recently approached agency media executives about its plan to redistribute the number of prime-time commercials it airs.

The network said it plans to keep its overall prime-time commercial load the same but would move units into higher-price, hourlong shows like "60 Minutes" from lower-price, hourlong programs like "Rescue: 911."

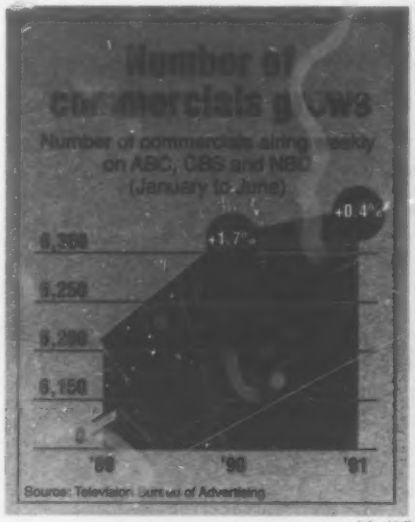
Agency executives say if CBS proceeds with its plan, they want to renegotiate their upfront deals.

"We don't think it's acceptable to do after we've made our deals," said Richard Kostyra, New York-based exec VP-director of media services at J. Walter Thompson USA. "I would expect that advertisers who bought into a program thinking there was going to be 7 commercial minutes [and] suddenly find out there are 8 are due some form of compensation."

While CBS has openly approached agencies about its plans, ABC and NBC began adding commercial time during the mid-1980s without telling the ad community.

Through the first six months of 1991, the number of commercials airing weekly on the Big 3 networks increased 0.4% to 6,342, compared with the same period in 1990, ac-

(Continued on Page 42)



John Hall

No more 'monsters'

Volvo carefully documents new advertising

By Raymond Serafin

In its first campaign since the "monster truck" ad scandal, Volvo will again use dramatic demonstrations to illustrate safety. But this time, video cameras and still photographs documented that there was no foul play.

The first major image work for Volvo from Messner Vetere Berger Carey Schmetterer, New York, is said to feature a spot for the new Volvo 960 sedan in which the passenger compartment stays intact after the car is hit from behind during a rainstorm and crashes head-on into a wall.

Officials at Volvo Cars of North America and the agency wouldn't talk about the campaign until after dealer previews Oct. 4 to 6; ads break Oct. 7.

A source familiar with the production of the crash commercial said Volvo and

"The production company and the agency made it clear that we shouldn't modify the car in any way."

Messner Vetere took stringent on-set precautions to guard against a repeat of what happened a year ago, when the roof of a Volvo car was reinforced before an oversize

(Continued on Page 42)

LAST MINUTE NEWS

Chevy trucks trade 'Heartbeat' for 'Rock'

WARREN, Mich.—Chevrolet will drop its "Heartbeat of America" music in 1992 model-year truck ads, replacing it with the Bob Seger song "Like a Rock," said sources familiar with the campaign. The campaign, to be unveiled this week, is said to focus on the emotional bond between drivers and their trucks. Lintas:Campbell-Ewald handles.

Warner readies retail stores

BURBANK, Calif.—Warner Bros. will open four Warner Bros. Studio stores, similar to the Disney Store retail units, by Nov. 1 in Los Angeles; Schaumburg, Ill.; Danbury, Conn.; and Fairfax, Va. At 6,000 to 8,000 square feet, the stores will be about twice the size of the average Disney store. Newspaper, radio and outdoor ads, created in-house, support.

Ciba-Geigy mulls media buying setup

NEW YORK—Ciba-Geigy Pharmaceuticals has begun a review of independent media buying services, and that could lead to a consolidation of assignments, buying sources said. The company spent an estimated $38 million on media in 1990, according to LNA/Arbitron Multi-Media Service. Both a corporate spokesman and a spokesman for

(Continued on Page 8)

INSIDE

James Brady finds someone who doesn't like Ovitz. **Page 26.**

Ad Review: Garfield tries on Calvin's ads. **Page 46.**

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NEWS SUMMARY

■ **Christmas season** sales will favor downscale products and mass merchandisers, observers predict. 1

■ **CBS' plan** to redistribute its prime-time commercials this season drew threats from major ad agencies, worried about clutter, to renegotiate their upfront deals. 1

■ **Volvo's** new ads will use dramatic demonstrations to illustrate safety, documenting their veracity in light of earlier charges its "monster truck" commercial was rigged. 1

■ **MCI and Sprint** pounced on AT&T's telephone outage on the East Coast last week with ads touting their reliability. AT&T planned new ads to rebuild consumer confidence. 3

■ **Ford and Lincoln-Mercury** cut back on the number of magazines carrying their 1992 model-year advertising, but will increase frequency in the remaining publications. 3

■ **'Time' magazine** is being revamped and will likely broaden its editorial format. 3

■ **Nutri/System** moved the creative portion of its $30 million account to Lotas Minard Patton McIver from FCB/LGK. . 3

■ **ABC-TV** has sold rights to produce and sell commercials for NCAA basketball games appearing on ABC to Raycom. . 4

■ **Leo Burnett Co.** named Richard B. Fizdale chairman-ceo, effective Jan. 1, succeeding Hall "Cap" Adams. 4

■ **Lowe Group,** an Interpublic unit, is negotiating to buy Scali, McCabe, Sloves from WPP Group. 4

■ **Coors Brewing Co.** will start advertising for non-alcoholic Coors Cutter next month. 4

■ **Radio stations'** local marketing agreements are under scrutiny by the Federal Trade Commission. 12

■ **Europeans** will increasingly favor U.S. products, according to a survey from Henley Centre. 16

■ **Kuwait** has resumed TV advertising, but advertisers want rate reductions due to a 38% drop in population. 16

■ **Northwestern University** has introduced integrated marketing to replace its graduate advertising program. 17

■ **Unnamed products** are stars of ad campaigns from Philip Morris USA (believed to be for Merit cigarettes) and McCain Citrus for Boku fruit juice drinks. In both cases consumers mail in for samples of the unnamed products. 17

■ **Magazine ad pages** fell 10.2% in August from a year ago, according to Publishers Information Bureau. 28

■ **National Advertising Division** handled 14 ad self-regulation cases in its latest report, including American Greetings' sales leadership claims for its Forget Me Not cards. ... 38

■ **Nike** is preparing a commercial for its Air Flight Lite line in which Chicago Bulls star Scottie Pippen is transported back to the 1950s. It will break next month. 46

■ **Conde Nast Publications** named Julie Lewit-Nirenberg publisher of *Mademoiselle* and Lawrence Burstein publisher of *Self*. Both come from outside the company. 46

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Ad slide dogs titles

Few magazines make page gains in August

By Scott Donaton

Magazine publishers have a whole new definition for the dog days of summer.

Magazine ad pages fell 10.2% to 10,263.6 in August from a year earlier, Publishers Information Bureau reported. For the first eight months, pages totaled 96,034.9, down 10.3%—a staggering 11,064.5 pages—from the same period in 1990.

Among the top 10 magazine ad categories, only computers and office equipment posted gains in both pages and revenues after eight months *(see chart)*. Nine categories were down in pages while eight fell in revenue.

The severity of the ad page drought showed in the weak August performances of several titles. *Metropolitan Home* saw pages fall 49.6% to 45.7 for the month; it posted a year-to-date decline of 29.6%. *Architectural Digest's* 116.5 pages for August were down 46.8% (down 31.8% for January-August). *Esquire's* August pages were down 40.7% to 53.2 (down 34.3% for the year). *European Travel & Life*, with 21 pages, was off 37.8% for August and 15% for the year. And *Reader's Digest* fell 35.4% to 41.9 pages for August; it was down 19.7% for the year.

MEDIA WORKS

Conversely, *Penthouse* continued to show solid gains with August pages up 70% to 63.1. *Decorating Remodeling* was up 64.5% with 54 pages, and *Soap Opera Digest* was up 39.4% with 26.2 pages. Year-to-date gains were 18.4%, 3.5% and 6%, respectively.

In the national Sunday magazine category, *Parade* carried 477.5 ad pages through August, an increase of 7.3%. *USA Weekend's* 422.4 pages for the period were down a slight 0.5%.

Local Sunday magazines didn't fare as well. *The New York Times Magazine* pages dipped 26.2% to 1,652.3 through August; the *Los Angeles Times'* Sunday magazine was down 5.5% with 555 pages.

Although *Bride's* became the first magazine of the year to top the 2,000-page mark, its 2,220.1 ad pages were down 5.7% from the year before. Second-ranked *Business Week's* 1,930.6 pages were down 22.8%. *Modern Bride* was a close third with 1,927.8 pages, an increase of 1.9%.

The remainder of the top 10—*People, Forbes, Fortune, Vogue, The Economist, TV Guide* and *Sports Illustrated*—all suffered double-digit declines.

Modern Bride was one of just two top 20 titles with an increase in ad pages through August. The other was No. 15 *Golf World*, up 0.3% with 1,141.4 pages.

Many titles published by Family Media, which shut down last month, may disappear from the PIB list after the August report. *1,001 Home Ideas* saw pages drop 25.2% to 338.2 for the first eight months; *Golf Illustrated's* 362 pages were down 12.5%; *Health*, whose subscription list was recently bought by rival *In Health*, was up 8.6% with 275 ad pages; *HomeOwner* was up 11.4% with 184.8 pages; and *World Tennis* had 289.6 pages, up 0.6%.

Discover, recently bought by Walt Disney Co. and resuming publication with the November issue, was off 14.3% through August with 227.3 pages. □

Top 10 magazine ad categories by revenue

Category	1991 revenue	% chg	1991 pages	% chg
Automotive*	$554,659,063	(1.9)	9,762.4	(10.1)
Toiletries & cosmetics	$406,812,905	(2.8)	8,480.5	(10.5)
Direct response	$358,096,140	8.6	11,785.9	(0.4)
Food	$275,274,290	(6.8)	4,449.9	(14.8)
Business & consumer svcs.	$254,383,615	(17.6)	6,800.3	(21.5)
Apparel**	$231,748,634	(7.8)	8,127.5	(9.4)
Travel, hotels & resorts	$228,150,123	(7.9)	7,109.9	(9.9)
Cigarettes & tobacco	$181,417,290	(5.4)	3,018.8	(9.9)
Computers & office equip.	$157,007,065	10.9	3,344.5	2.2
Liquor	$124,478,624	(4.3)	2,631.8	(5.6)

The top 10 categories account for 71% of total advertising. Revenue and page figures are from January-August 1991. *Includes accessories and equipment. **Includes footwear and accessories. Source: Publishers Information Bureau

Magazine ad page leaders

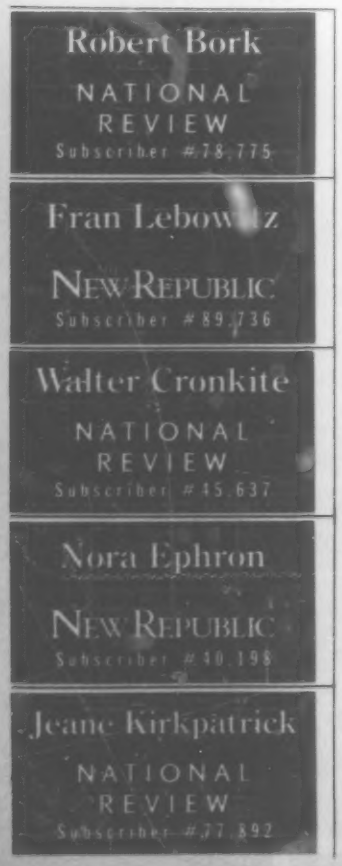
Publishers Information Bureau figures for January through August 1991.

Rank	Magazine	Pages	% chg	Dollars	% chg
1	Bride's	2,220.07	(5.7)	41,787,812	(0.1)
2	Business Week	1,930.64	(22.8)	117,374,548	(16.3)
3	Modern Bride	1,927.77	1.9	30,881,390	0.1
4	People	1,842.07	(14.4)	192,080,851	(5.4)
5	Forbes	1,831.01	(17.3)	82,508,235	(14.2)
6	Fortune	1,621.51	(19.6)	85,905,548	(11.4)
7	Vogue	1,465.31	(12.9)	59,075,308	(5.1)
8	The Economist	1,463.34	(11.8)	13,897,432	(3.4)
9	TV Guide	1,446.52	(16.9)	170,188,266	(9.8)
10	Sports Illustrated	1,330.78	(14.7)	182,589,157	(6.9)
11	Entrepreneur	1,311.59	(0.1)	14,314,996	13.6
12	New York Magazine	1,289.11	(16.7)	22,381,203	(11.2)
13	Cosmopolitan	1,258.22	(6.4)	81,078,380	(0.2)
14	Time	1,244.05	(20.7)	187,588,647	(12.9)
15	Golf World	1,141.45	0.3	-10,130,044	10.6
16	U.S. News & World Report	1,102.43	(5.2)	94,117,854	1.5
17	Newsweek	1,101.20	(17.0)	129,405,399	(11.8)
18	Glamour	1,039.65	(9.3)	56,545,535	(4.5)
19	Skin Diver	983.58	(0.8)	10,034,000	7.4
20	Good Housekeeping	979.91	(6.8)	102,490,674	3.0
21	The New Yorker	977.00	(23.0)	27,404,063	(16.6)
22	Rolling Stone	963.67	(17.0)	39,445,635	(8.8)
23	Elle	955.76	(23.9)	32,047,205	(14.6)
24	Muscle & Fitness	944.57	13.1	17,223,146	20.3
25	American Way	922.50	(16.3)	13,752,035	(8.5)
26	Sunset	907.30	(7.9)	27,041,626	(10.5)
27	Ladies' Home Journal	906.55	(3.2)	70,652,440	4.7
28	Family Circle	901.52	(12.7)	78,356,547	(7.2)
29	Yachting	888.16	(16.3)	5,842,532	(11.9)
30	GQ	877.02	(20.9)	24,162,360	(12.1)
31	Car & Driver	846.22	0.8	33,577,784	4.6
32	Popular Photography	842.29	4.9	20,088,675	4.2
33	Parents	838.52	(7.1)	37,495,160	1.6
34	Texas Monthly	833.88	(2.8)	9,715,416	0.7
35	Golf Digest	827.13	(10.8)	48,254,305	1.9
36	Mademoiselle	817.70	(13.8)	28,898,191	(8.1)
37	Architectural Digest	815.90	(31.8)	23,413,077	(26.2)
38	Travel & Leisure	805.77	(5.8)	34,251,356	(2.5)
39	Better Homes & Gardens	797.54	(1.3)	99,060,673	9.3
40	Golf Magazine	758.02	(8.2)	28,143,846	2.6
41	Woman's Day	742.47	(17.4)	57,914,886	(11.0)
42	Southern Living	738.26	(10.1)	39,191,167	(4.7)
43	Bicycling	733.44	(7.9)	11,163,896	0.3
44	Money	731.94	(6.7)	50,135,330	3.5
45	Vanity Fair	715.48	(6.3)	25,727,696	(5.2)
46	Road & Track	713.33	(2.9)	21,810,953	(0.3)
47	W Magazine	683.93	(17.2)	15,931,247	(16.4)
48	Salt Water Sportsman	672.80	(18.7)	4,765,421	(10.3)
49	Jet	670.50	(0.6)	11,891,505	3.9
50	Seventeen	668.60	(23.9)	23,640,593	(10.3)
51	Redbook	666.59	(6.2)	44,389,163	(1.3)
52	Gourmet	665.31	(11.6)	19,992,664	(0.9)
53	Harper's Bazaar	624.83	(19.0)	16,394,556	(11.4)
54	Ebony	620.85	(11.6)	24,011,841	(3.1)
55	Black Enterprise	619.28	(4.4)	9,183,892	6.4
56	McCall's	618.52	0.4	49,809,664	10.0
57	Conde Nast Traveler	617.94	(2.9)	18,565,520	4.0
58	Four Wheeler	617.12	(7.0)	5,668,577	6.9
59	Country Living	596.72	(15.1)	27,119,073	(4.2)
60	Self	572.66	(27.5)	23,715,804	(22.0)
61	Town & Country	569.50	(34.9)	15,779,065	(25.3)
62	Motor Trend	565.88	(6.0)	22,190,122	2.2
63	Bon Appetit	560.25	(14.3)	18,148,646	(8.5)
64	Inc.	555.30	(18.1)	25,152,255	(9.0)
65	San Francisco Focus	551.54	(24.9)	3,814,077	(22.7)
66	Outside Magazine	546.89	10.9	11,168,845	24.8
67	Reader's Digest	546.45	(19.7)	60,819,784	(15.1)
68	Automobile Magazine	536.11	4.3	13,972,705	42.0
69	Compute	535.45	NA	4,773,147	NA
70	Mirabella	529.62	(11.3)	11,044,116	16.8
71	Smithsonian	527.85	(11.8)	23,706,037	(7.8)
72	HG	522.56	(15.6)	14,235,307	(6.5)
73	Entertainment Weekly	521.77	(0.4)	12,581,593	14.4
74	Hot Rod	513.01	(6.8)	12,983,177	(1.8)
75	Metropolitan Home	509.93	(29.6)	18,456,772	(19.8)
76	Working Woman	509.34	(13.8)	17,033,611	(6.9)
77	Essence	502.87	(12.6)	14,095,663	(2.7)
78	Delta Sky	498.40	(9.9)	14,145,035	3.2
79	Esquire	491.47	(34.3)	16,362,855	(30.7)
80	Parenting	485.77	9.9	11,443,295	46.3
81	Penthouse	482.02	18.4	19,687,166	17.5
82	Sports Afield	477.59	(7.5)	10,168,709	2.5
83	Parade*	477.45	7.3	245,834,640	14.7
84	Field & Stream	476.25	(8.1)	22,695,331	3.9
85	Playboy	476.23	7.8	31,181,122	4.6
86	Outdoor Life	476.14	(7.4)	16,181,768	2.8
87	New Woman	471.08	(19.5)	13,040,156	(9.0)
88	Tennis	469.24	(2.9)	16,453,880	3.7
89	Popular Mechanics	456.00	(12.0)	16,478,983	(2.2)
90	Popular Science	451.69	(8.1)	14,139,694	1.5
91	Bassmaster	449.75	(8.3)	9,337,257	(3.9)
92	House Beautiful	435.67	(6.3)	17,897,307	6.7
93	Shape Magazine	434.96	2.6	7,423,118	(6.1)
94	Omni	434.31	11.6	11,925,924	(4.6)
95	Premiere	432.24	(11.5)	8,757,360	0.2
96	Yankee	427.13	(10.4)	5,642,322	(1.1)
97	USA Weekend*	422.41	(0.5)	83,874,036	14.9
98	Working Mother	418.84	(9.9)	10,444,727	(3.6)
99	Financial World	416.27	(38.0)	9,922,388	(37.0)
100	Atlantic	382.51	(3.9)	7,033,651	8.7

Percent change compares January-August in 1991 with 1990. *National Sunday magazine, tracked separately by PIB. Source: Publishers Information Bureau

MEDIA MIX

News briefs on print, electronic and alternative media.



Letter from the editor. *Conde Nast Traveler* in its October issue —which includes the results of its "readers' choice" survey—invites readers to join a new "Reader Advisory Panel." The magazine will survey the panel on various lifestyle and travel-related issues on behalf of advertisers, which can use the information to better tailor their marketing efforts, said Publisher Thomas Florio. "It's really putting the reader and the advertiser together to talk to each other," he said. The monthly expects 5,000 to 10,000 readers to join the panel, which the editorial staff also will poll.

ABC-TV tunes in radio promos. In an effort to reach more finely targeted audiences than traditional network TV fall promotion strategies, ABC this month is using local radio promotions to back three new series: "Home Improvement," "Sibs" and "Good & Evil." Tie-ins with local radio stations and some advertisers in eight markets are customized to each show. For example, KEGL-FM, Dallas, and Elliot's True Value hardware store are sponsoring a "Handy Man Hero" contest promoting "Home Improvement." The radio listener who calls in the worst home repair horror story wins a $1,000 shopping spree at Elliot's.

Vote of unconfidence. Political ad spending on TV is projected to total $230 million in 1992, up only 0.9% from 1988, the Television Bureau of Advertising reported. "While we expect record spending by political candidates next year, it will hardly be a windfall for broadcasters, especially in the context of the current depressed media economy," said bureau President Jim Joyella. TvB projects $200 million in spot and local spending, up 5.8%, and $30 million in network spending, down 23%.

Separately, TvB estimates total U.S. TV ad spending will rise 4% to 6% in 1992, up from a projected $27.7 billion for 1991. Network TV is expected to grow 4% to 6%; spot and local TV, 3% to 5% each; syndication 7% to 9%; and cable TV 8% to 10%.

Hachette job. Hachette Magazines is redesigning the 24 service-oriented titles of its *Woman's Day* Special Interest Publications. The first of the remodeled publications, *Home Decorating Ideas*, appeared on newsstands Aug. 27.

CNN and Tass hit the books. Turner Broadcasting System's Cable News Network and Tass, the Soviet news agency, have reached an agreement to publish a book of photos and text about the recent coup attempt in the Soviet Union. The book is tentatively titled "Three Days That Shook the World: The Collapse of Communism in the Soviet Union" and will be produced by Turner Publishing, a division of Turner Broadcasting System. □

Joe Mandese coordinates MediaWorks.